

## Giving Subject Specialists the Tools They Need to Succeed: The Collection Development Training Manual at the University of Maryland

Margaret Z. Saponaro  
*University of Maryland Libraries*, msaponar@umd.edu

Follow this and additional works at: <https://docs.lib.purdue.edu/charleston>



Part of the [Collection Development and Management Commons](#)

An indexed, print copy of the Proceedings is also available for purchase at:

<http://www.thepress.purdue.edu/series/charleston>.

You may also be interested in the new series, Charleston Insights in Library, Archival, and Information Sciences. Find out more at: <http://www.thepress.purdue.edu/series/charleston-insights-library-archival-and-information-sciences>.

---

Margaret Z. Saponaro, "Giving Subject Specialists the Tools They Need to Succeed: The Collection Development Training Manual at the University of Maryland" (2015). *Proceedings of the Charleston Library Conference*.  
<http://dx.doi.org/10.5703/1288284316242>

# Giving Subject Specialists the Tools They Need to Succeed: The Collection Development Training Manual at the University of Maryland

*Margaret Z. Saponaro, Interim Head of Collection Development and Librarian for Journalism, University of Maryland Libraries*

## Abstract

The University of Maryland Libraries (UMD) employs over 40 librarians with collection development responsibilities. These subject specialists represent a range of varying experience levels with collection development—from new librarians to seasoned veterans. Although many subject specialists are required to use the same tools for their collection development activities, materials to support these activities were not always easy to find, nor was there one place available to direct new subject specialists who needed resources to assist them with their responsibilities. This paper describes the process undertaken to develop of a toolkit for materials for subject specialists at the UMD Libraries, including the key issues identified by subject specialists and members of the Libraries's Acquisitions unit, the framework developed for the toolkit, and the implementation process for the toolkit.

## Introduction

At the University of Maryland Libraries (UMD), over 40 librarians have responsibilities in collection development. Called subject specialists, these individuals represent a range of experience levels, from newly hired librarians to those with many years of experience at UMD or elsewhere. During 2014, the author, then the librarian for journalism and hearing and speech sciences, was approached by the associate dean for collection strategies and services to participate in a job enrichment program (job rotation) in the collection development department. The enrichment program is available to staff and librarians throughout the UMD libraries, and provides participants with an opportunity to explore an area of interest outside regular job responsibilities for a defined period of time. After exploring options for the job rotation, creating a training manual or toolkit for subject specialists to facilitate their collection development activities was selected as the job rotation project. This was done primarily because of the author's prior experience with and interest in collection development instruction (Evans and Saponaro, 2005; 2012), and the timeframe for the project (March-August, 2014).

## Design Process

At the outset of the project, a three-pronged approach was developed in order to create a toolkit that adequately met the needs of subject specialists at UMD. This process consisted of conducting a literature review, holding in-person interviews with selected individuals in both public and technical services, and creating, distributing and analyzing the results of an online survey sent to individuals with selection responsibilities at UMD.

The literature review was intended in order to identify best practices in training for librarians with little background in collection development. However, a search of the literature accessible via *Library and Information Source Complete*, *ERIC*, *Education Research Complete* and *Google Scholar* revealed that very little current research existed with examples of training manuals for collection development librarians. Despite the lack of current research, two articles (Perkins, 1982; Carter, 2004), did provide useful background on the topic.

Despite the lack of current research, a review of websites on the subject did yield several examples and ideas for areas a training manual should

include or address. Of note was the Collection Manager's Manual from the University of California, Santa Barbara Library (UCSB, <http://collman.library.ucsb.edu/>). Through the inclusion of a First Day Kit for Collection Managers (<http://collman.library.ucsb.edu/firstday.html>), the UCSB site acknowledged the needs of new selectors. This idea resonated with the author, as well as the manager of collections and the associate dean for collection strategies and services. Other online manuals of note included those from Cornell University (<http://www.library.cornell.edu/colldev/cdmanualcontents.html>) and Rutgers ([http://www.libraries.rutgers.edu/rul/staff/access\\_serv/coll\\_mgt/coll\\_mgt.shtml](http://www.libraries.rutgers.edu/rul/staff/access_serv/coll_mgt/coll_mgt.shtml)).

The second step in the process was to conduct brief (20–30 minute) in-person interviews with individuals from public services, collection development, and acquisitions in an attempt to determine a list of elements to include in the manual. A total of eighteen interviews were held during a six-week timespan. The individuals selected for interview represented a variety of experience levels and job responsibilities at UMD, in order to try to capture as many viewpoints as possible. Interviews with acquisitions and collection development personnel gave the participants an opportunity to identify frequently asked questions or workflow issues encountered when working with selectors, as well as indicate training needs that would fall outside the scope of the *Manual*. The interviews also were useful in identifying existing resources that could be included within the *Manual*. Interviews with subject selectors gave the participants an opportunity to reflect upon areas or processes where they encountered challenges or had frequent questions, and identify areas where their selection work could be facilitated. In order to respect the privacy of all those interviewed, results of the in-person interviews were shared in aggregate with the associate dean for collection strategies and services and the manager of collections.

Since not all subject specialists could be interviewed individually, the third step in the process was to create and distribute an online survey to all librarians with collection

responsibilities. The survey itself was designed using the *Qualtrics* survey platform, which is available via site-license at UMD. The survey contained six questions, and respondents were asked to provide input on the following:

- Areas of collection development where they have frequent questions
- What policies and procedures do they need to be able to refer to on a regular basis
- Their preferred method of learning
- Other questions or concerns that could be addressed in an in-person training session
- What tools and resources they use for selection
- What items would be considered “must haves” in a training manual

Respondents were also asked to indicate the number of years they had worked in collection management/selection at the University of Maryland Libraries for classification purposes. Respondents self-reported themselves into one of four groups, based on their length of service at the Libraries. The highest number of responses (39%) came from librarians with one to five years of experience at UMD. The second highest response rate came from librarians with over ten years of experience (26%). The online survey was open for a total of 13 workdays (18 calendar days). There were 31 responses to the survey for a total response rate of 65.9%. Survey responses were anonymous and results were shared with the associate dean for collection strategies and services and the manager of collections.

## Key Issues Identified

A number of issues came to light as a result of both the in-person and online surveys. Areas that could be addressed through the *Collection Development Training Manual* included:

- Policies and procedures—including links to the UMD Collection Development Policy, a timeline for selectors, policies for gift books, information on realignment/weeding and the desiderata

process, and an overview of the Research Data Services unit at UMD

- Tools for selectors—including information on or links to the online acquisitions system (such as resetting passwords, requesting reports, checking fund code balances), the online ordering systems (such as login information, creating folders and notifications, training opportunities), commonly used forms for ordering print and electronic resources, tools frequently used in selection (such as e-mail reflectors, websites, *CHOICE*, or other resources suggested in survey responses)
- Helpful resources/appendices—including a glossary of terms and a contact list for questions

Other notable requests included providing an overview of the UMD philosophy of collection development—including what are priorities for withdrawing materials, a list of acronyms used in collection development, and a list of talking points about the libraries's special collections unit that selectors could share when working with individuals in their subject disciplines.

Subject specialists also indicated an interest in a wide range of training opportunities, ranging from how to transfer money within fund codes to how to check fund code balances. Although providing training programming was outside the scope of the job rotation project, these themes were shared with the associate dean for collection strategies and services and the manager of collections for further action.

## Toolkit Framework

Because the largest number of survey respondents fell in the category of new librarians, it was evident that a prominent section of the *Manual* be devoted to "Resources for New Selectors." This section would serve as a "quick start" by providing an overview of the collection development unit, as well as links to items/tools such as the acquisitions and ordering systems used at UMD, a timeline or calendar of selection

activities, a list of selectors by subject, a list of selection tools, and a contact list for questions.

A guiding design principal for the *Manual* was that wherever possible, the *Manual* would link to existing content on the Libraries's public website, the Libraries's Intranet or elsewhere on the Internet, rather than duplicating content that already existed. It was hoped that by linking to existing content, that would help keep the *Manual* current.

Content included in the *Manual* was divided into five sections, including the aforementioned "Resources for New Selectors" section. Other sections of the *Manual* are:

- Overview of the collection development unit—including an unit overview and links to key committees and task forces
- Policies and procedures—including links to key policies such as gift items and the desiderata process
- Tools for selectors—providing links to overviews for the acquisitions and ordering programs used at UMD, listings of gift funds and selection tools, and an overview of research data services and special collections and university archives
- Helpful resources and appendices—including contact information for collection development, acquisitions and vendors, and a glossary of terms

Although much of the content in the *Manual* could be linked from existing pages from the Libraries's public website or Intranet, documents created by the author specifically for the *Manual* included:

- Sample completed forms for requesting print and electronic materials (materials request form and electronic request form), along with completion instructions for each
- A suggested list of reflectors, journals, and other resources used in the selection process, including those items identified by the selectors themselves

- A glossary of terms for acquisitions and the online ordering system

Other items in the *Manual* contributed by colleagues included a collection policy for Research Data Services and key talking points on special collections and university archives.

Throughout the development of the *Manual* framework and individual components, the author collaborated with colleagues from the acquisitions unit of the libraries as well as the UMD representative from YBP. The expertise of these individuals was invaluable in creating tools that would be useful for selectors.

### Implementing the Toolkit

Because the *Manual* included proprietary information from one of the vendors for the UMD Libraries, the decision was made to house the *Manual* within the staff-only Library Intranet (Libraries Intranet or LIBI), based on the *Drupal* open source platform. In addition to linking to existing resources such as listings of departmental liaisons and the Libraries's gifts in kind manual, the author created a total of 19 new pages for LIBI in the span of four months. The graduate assistant for collection development assisted the author in creating and linking many of the pages, as well as with proofreading and troubleshooting the *Manual*.

Once complete, the manual was reviewed by the associate dean for collection strategies and

services and approved for distribution. At this point, a link to the *Manual* was prominently placed at the top of the "Resources for Selectors" section of the existing collection development page on LIBI.

Additionally, once the *Manual* was finalized and linked, an overview of the project was shared with subject specialists at the collection development assembly meeting held in January 2015. Since that time, components of the *Manual* continue to be updated as services, policies, processes, and resources change. New selectors are given an overview of the *Manual* during an orientation session with the Interim Head of Collection Development.

### Conclusion

The Collection Development Training Manual project spanned 10 months and involved the time and energies of many individuals throughout the UMD Libraries. It provided the author with an opportunity to explore an area of interest and experience with specialized CMS and survey tools (*Drupal* and *Qualtrics*). One unexpected result of the project was the number of issues raised by selectors that may otherwise not have been realized or acted upon had this project not occurred. The *Manual* continues to be used by selectors and components within it are regularly updated as needed. It is hoped this tool will continue to benefit selectors at the UMD Libraries for many years to come.

### References

- Carter, N. F. (2004). Bibliographer's manual: A new life, a new process. *Collection Management*, 29(1), 31–41.
- Dubicki, E. (2007). Basic marketing and promotion concepts. *Serials Librarian*, 53(3), 5-15.
- Edward Evans, G., & Saponaro, M. Z. (2012). *Collection management basics*. 6<sup>th</sup> ed. Library and information science text series. Santa Barbara, CA: Libraries Unlimited.
- . (2005). *Developing library and information center collections*. 5<sup>th</sup> ed. Library and information science text series. Westport, CT: Libraries Unlimited.
- Perkins, D. L. (1982). Writing the collection development manual. *Collection Management* 4(3), 37–48.